Networked Change
In Canada

INSTITUT BROADBENT INSTITUTE | NetChange

A discussion paper authored by Tom Liacas & Jason Mogus | April, 2017

Presented by...

The stars of this story are the campaigners and movement builders on the front lines of today's most important social change efforts. With their diverse backgrounds and skills, they stepped up to face injustice and to fight systems with much greater wealth and power. Through trial and error and hard work these campaigners developed the approaches needed to win against all odds. Our ultimate intention with this report is to support them and to inspire others to follow their lead.

Funding and Support

Author Bios

Tom Liacas | Having pioneered distributed organizing tactics as global coordinator of Adbusters' Buy Nothing Day in the late nineties, senior NetChange strategist Tom Liacas went on to the academic and private sectors, where he developed expertise in digital marketing and online stakeholder dialogue. His insights on the power of networked social movements have led him to speak repeatedly before the leaders of major NGOs and Fortune 500 companies. Now back to helping good causes gain traction through his consulting work, he also writes frequently for The Guardian, Mashable and Mobilisation Lab.

Jason Mogus | A digital pioneer for two decades, Jason Mogus is the principal strategist at NetChange Consulting (formerly Communicopia). He has led digital transformation projects and campaigns for some of the world's most recognized social change organizations and movements. In 2012, he created the world's first report on non-profit digital teams and in 2015 was named a fellow of the Broadbent Institute. His campaigns have won elections and Webby awards, raised millions of dollars, and transformed dozens of institutions, leaders and teams for the digital world.

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1.0 OVERVIEW

This report maps out the strategies and practices that lie behind today's most successful advocacy campaigns both in Canada and abroad. In the process, we hope to demonstrate how and why they succeed in creating lasting change on the issues they address while so many others fail. Our goal is to transmit a model that can be learned and replicated by other campaigners.

In our original **2016 Networked Change** report, we identified and studied 47 mainly U.S.-based advocacy campaigns that achieved significant *impact* by forcing changes to corporate or government policies or creating widespread attitude change. To reflect the needs of most progressive organizers, we put a special focus on groups that started with relatively few resources and went on to achieve substantial victories, an attribute we called *force amplification*.

Our initial report spent a good deal of time picking apart the strategies and tactics that contributed to the power of these campaigns. When we mapped recurring patterns, we found a common recipe behind the success of these top-performing campaigns. We called this overall model "directed-network campaigning."

In a nutshell, directed-network campaigning is a hybrid form of top-down and bottom-up mobilization best exemplified by Bernie Sanders' presidential campaign, 350.org's multiple campaigns to fight climate change and by #FightFor15, the campaign for a $15 minimum wage in the United States. These campaigns and others like them enabled extensive grassroots-led initiatives while also powerfully framing their causes and directing campaign momentum towards sharp political goals and shared activities. As a result, each group was able to rapidly scale participation and resources while scoring impressive national victories.

> **Directed-network campaigns achieved success, we believe, because of their ability to open up to the new cultural forces that favour openness and grassroots power, but also because they framed and strategically directed this power towards concrete policy outcomes. In short, they married new power with old.**

As a new model gaining ground, directed-network campaigning has now achieved penetration and scale not only in the U.S., but also in Australia and Canada, as the case studies in this report will demonstrate. Tried and tested in

the field, this powerful new model becomes extremely relevant to those working for social change and to those funding such work. It is our hope that the analysis and recommendations in this report will enable accelerated implementation of best campaigning practices by progressive movements of all sizes.

UPPER: Idle no more protesters marching along Government Street on December 21, 2012
photo credit: R.A. Paterson Lws & Clrk (Flickr)

LOWER: BLM Toronto Action Against Islamophobia
photo credit: Lws & Clrk (Flickr)

2.0 METHODOLOGY

Our report's primary research goal was to determine what makes some of today's most successful advocacy campaigns work, while so many others fail to make an impact.

"Success" in our model is defined in two ways. First, it is measured by "impact," namely clear changes in corporate or government policy and / or widespread attitude change because of campaign activity. Second, impact is measured in relation to the base resources of the organization or network leading the advocacy efforts. Here, by measuring how much a campaign achieved given its capacity at the outset, we add "force amplification" as a key indicator. Therefore, in our model, groups that started with relatively few resources and went on to achieve substantial victories are viewed as even more successful than large legacy organizations that achieved similar results with substantial pre-existing membership and resources.

In our original 2016 study, which focused largely on U.S. campaigns, the 47 case studies isolated for the report were all deemed "successful" according to the criteria above. Looking across the political spectrum, we reviewed progressive causes such as Black Lives Matter, #FightFor15, Not1More, the movement to stop the Keystone XL pipeline, as well as conservative powerhouses such as the NRA and the Tea Party, and recent corporate campaigns by Airbnb and Uber.

The data that formed the basis for the report was gathered through research that was in-depth and in many cases first person and hands-on. The current study sample is composed of 54 campaigns (46 U.S. and eight Canadian) that were examined over several years. Of these, the authors participated in frontline campaign work on 17 cases. They interviewed campaign directors in 18 cases, and performed detailed literature reviews for the remaining samples.

In a first pass through the data, study cases were evaluated according to the extent of their policy or attitude change impacts and then reclassified according to the organizational resources available to the campaigns at the outset. These filters isolated a class of campaigns called "directed-network campaigns" that were deemed especially valuable for our study since they responded to our success criteria both in terms of their impact and their force amplification.

To organize the research, we used a *pattern matching* approach that identified recurring practices in the campaigns studied, and then isolated those most

common to directed-network campaigns. The operational *approaches* revealed by our study were then grouped under four thematic principles. Each approach is explained in some detail in the report, with anecdotes to illustrate how they were implemented by the groups in our study.

RIGHT: Janaya Khan, Co-founder of Black Lives Matter
Toronto Trans March, Toronto July 1, 2016
photo credit: Eric Parker (Flickr)

BOTTOM: LeadNow Canada — Toronto, ON protest
photo credit: Adrian A. Helleman (Flickr)

3.0 DIRECTED-NETWORK CAMPAIGNING IN CANADA

Though our original study looked at mostly U.S.-based case studies, we are now pleased to present similar innovations in Canada. Thanks to a partnership with the Broadbent Institute, we turn our focus to Canadian groups that are running this new hybrid-campaigning model successfully. Below is a brief snapshot of the stories of the groups and campaigns we studied and of the impact their work has had across the country.

ACORN Canada

ACORN Canada is an independent national organization mobilizing grassroots supporters from low and moderate-income families with more than 102,000 members organized into 20 neighbourhood chapters in nine cities across Canada. Over the years, ACORN has led mobilizations that have won several important victories. These include: provincial Payday Lending legislation in Ontario and BC; working in coalition to raising the minimum wage in Ontario to $11/hour, indexed to inflation; and ending the child support clawback in BC to put $13 million back in the pockets of single parents.

Black Lives Matter - Toronto

Black Lives Matter – Toronto was sparked in 2014 by the U.S. protests over the police shooting of Darren Wilson in Missouri and a desire to underline similar anti-black racism behind local shooting deaths of Black youth, such as that of Brampton resident Jermaine Carby. Growing organically in response to a massive show of grassroots interest, the movement has built a network of thousands of followers guided by a small core of volunteer organizers. Their effective public interventions, such as the 2016 Black Lives Matter-Toronto Tent City, have reinvigorated the discourse around systemic Canadian racism, forced the disclosure of police reports, and pushed political figures, such as Ontario Premier Kathleen Wynne, to publicly engage with the group's demands.

CUPW-CPAA Postal Banking Campaign

The Canadian Union of Postal Workers and the Canadian Postmasters and Assistants Association have banded together to advocate for the return of a postal banking system in Canada with the support of their members and a network of allied supporters. In 2016, they educated thousands of Canadians on the merits of postal banking, put the issue back on the map for the federal review of the postal service, and raised alarmed responses from the country's big banks who saw a threat to their monopoly.

Idle No More

Idle No More, a grassroots movement led by Indigenous women and two-spirited people, was launched in Saskatchewan in response to then Conservative prime minister Stephen Harper's omnibus legislation, that compromised First Nations' right to self-determination and a clean environment. Through teach-ins, rallies, protests and mass communication, the movement has grown to include more than 693 local groups around the world. In Canada, Idle No More has reopened a vital discourse on neo-colonialism and strongly affected the posture of the federal government towards key Indigenous concerns.

Leadnow

Leadnow is a multi-issue advocacy organization that determines its focus through supporter input and leverages actions by thousands of Canadians through its digital portal and partnerships with organizers and groups across the country. Vote Together, Leadnow's strategic voting campaign during the 2015 federal election, helped unseat Conservative candidates in 24 of the 29 swing ridings where it had recommended alternative candidates.

OpenMedia

OpenMedia creates community-driven campaigns that mobilize Canadians interested in keeping the Internet open, affordable and surveillance-free. Its Stop the Meter campaign on usage-based Internet billing generated 500K signatures and drove the CRTC to revise its rulings and to prevent companies from instituting an Internet pay meter. In December of 2016, OpenMedia

also led a nearly 50,000-strong citizen movement that pushed the CRTC to recommend the Internet be considered a basic service for rural and remote Canadian households.

Quebec Student Strike Movement

In 2012, after weeks of debate and consultation, Quebec's major student associations called for an ongoing province-wide strike to protest the Liberal government's proposed tuition fee hike. The strike grew into a more generalized movement against austerity measures that brought hundreds of thousands of Quebeckers out onto the streets. After many months of public actions and concerted pressure, the strike drove the government to repeal its proposed legislation and contributed to the Liberal Party's defeat in the following election.

The Canadian Tar Sands Campaign

The Canadian branch of the Tar Sands Campaign brings together a diverse network of First Nations communities, environmental NGOs, and citizens' groups determined to slow the expansion of Alberta's tar sands in order to reduce the industry's impacts on climate change and the well-being of adjacent communities. This campaign was instrumental in blocking the Enbridge Northern Gateway pipeline while also significantly damaging Stephen Harper's electoral prospects.

4.0 BACKGROUND AND THEORY

Over the past 30 years, the world has changed irrevocably and flows of power have shifted dramatically. Sadly, many of our advocacy campaigning practices have not kept up.

In a series of works dating back to the 1980s, eminent sociologist Manuel Castells outlined the rise of what he termed the "network society" and its impacts.[1] As technology and culture evolved in lockstep, he saw the emergence of networks as a new organizational form replacing hierarchies and having profound effects on our sense of individual identity and power, as well as our group behaviour and our relationships to traditional centres of authority.

We see the effects of network society much more clearly today in the erosion of organizational loyalties, the drop in institutional trust, and the increasing individual desire to choose, customize and co-create.[2] These are all manifestations of the network paradigm theorized decades ago. These new desires and expectations have clear implications for any campaign strategy that seeks to mobilize people towards a common goal.

New constraints, such as complexity and scarcity, must also be considered. There are now more advocacy groups than ever sharing a smaller and smaller base of funding[3], and public attention spans have been dropping[4] as more causes compete for mindshare and communications channels multiply.

This is the paradox of campaigning in the 21st century. With the new opportunities offered to us in a network society, raising a critical mass of supporters in a short amount of time has never been more possible. At the same time, with the complexity of the world's "wicked problems" and the scarcer resources now available to nonprofits, rallying the support and attention of people to your cause while building enough power to create systemic and lasting change has never been more challenging.

Given the trends outlined above, our research and professional experience tell us that most current advocacy initiatives are programmed to fail because they arise in environments that are resistant to innovation and where campaigning excellence is no longer a priority.

Many of the more established organizations we encounter are hardened into hierarchies that have lost touch with their responsive roots. In their strategy and operations, they have become closed off, top-down and policy-driven. With a focus on their own research and policy imperatives, they have also forgotten the art of disciplined campaigning, of fighting to win. They have come to believe that their good ideas can somehow change the world by themselves. As such, a good number of modern nonprofits are out of synch with the important emerging cultural forces that define successful campaigning practice more than ever these past few years

On the other hand, a notable set of younger organizations and movements is gaining power and surprising many with its rapid ability to scale, build influence and win policy change. These *directed-network campaigns* are succeeding, we believe, because they are aligned with new sources of self-organized people power, while maintaining enough centralized structure to focus it on clear political and cultural targets. In other words, they successfully marry new power with old power.

By opening to new models of organizing in a network society, directed-network campaigns generate greater public engagement and achieve rapid scale with relatively few resources at the outset. Employing an executive structure that establishes strategic direction and carefully manages resources, these campaigns also have what it takes to survive in an advocacy landscape now saturated with information and calls to action that compete for our attention.

The directed-network campaigning model that emerges from our report provides a clear and simple model to build on for organizers wishing to give their campaigns the best chances of winning. The incentives to adopt this new model are clear, but changing old practices and attitudes is never easy.

## 5.0 PRINCIPLES OF DIRECTED-NETWORK CAMPAIGNING

Since our goal is to transmit a model that can be replicated by other campaigners, we packaged the directed-network campaigning model into a set of practical approaches that show how leading campaigners bring it to life. The approaches we highlight are grouped into four separate campaign orientations that we call "principles" in this report.

The first two principles, *opening to grassroots power and building network hubs*, represent horizontal approaches that leave more power and agency with supporters and build more diverse cross-movement networks around causes.

Principles three and four, *frame a compelling cause and run with focus and discipline*, pertain more to the framing, management and proper execution of campaigns – typically areas that rely on the oversight of a central leadership body.

Understanding and implementing approaches from each of the four principles will allow organizers to set up and run directed-network campaigns and, in this way, apply a model that consistently achieves high impact and force amplification in today's challenging advocacy landscape.

In the sections that follow, we introduce the principles of directed-network campaigning and then break them down into concrete approaches. For each approach, we illustrate how groups from Canada and elsewhere have implemented them in their own way.
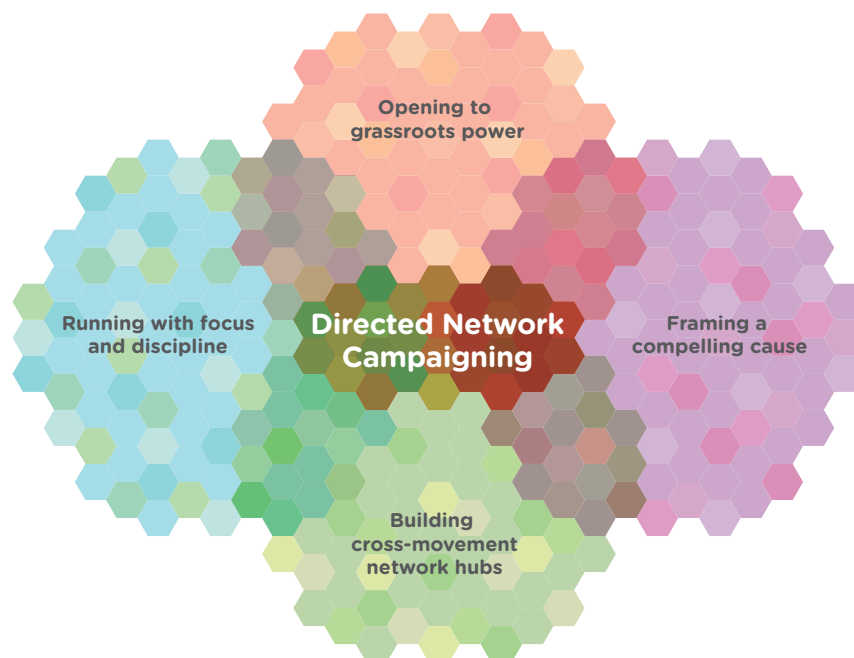
PRINCIPLE 1: Opening to Grassroots Power

Judging by the practices of all top campaign innovators in our study group, true grassroots participation in advocacy efforts is now a non-negotiable success factor. For one thing, it is essential as a sign of popular support, demonstrating power to the intended targets of a pressure campaign. Governments and corporations are much more likely to respond to pressure when they know that a critical mass is mobilized behind demands. Mobilizing that mass can certainly be easier in the digital age when the right approaches are applied.

In a network society, campaigns that mobilize grassroots participation also go much further than grasstops campaigns because they tap into widespread cultural expectations, especially among millennials. When called to support a cause or movement today's empowered individuals, quite simply want to contribute more and have more say over how things are done. Campaigns that give supporters an active role and the freedom to customize their participation generate a lot more commitment and enthusiasm and often gain precious insights and give rise to innovations by tapping into the collective intelligence of their crowd.

The following approaches are used by the campaigns we studied to open up to grassroots power.

Distributing agency:
Giving greater responsibilities and power to supporters and volunteers

This approach essentially entails opening leadership and some management responsibilities to a campaign's larger network of core supporters. The fact that many supporters now have the will and the drive to self-start local campaigns on their own is an enormous asset for those who take advantage of this new cultural reality. It enables movements to scale well beyond the financial and geographic limits of their core staff structure.

Typically, groups that run on this model carefully outline roles and responsibilities for their distributed leadership, prepare a digital "toolkit" for self-starters and convene regular check-ins led by central staff to ensure that problems are addressed and that the overall movement is aligned.

In Canada: From its beginnings and by design, Idle No More was a distributed movement. Self-starting groups across the country replicated the model locally with the support and encouragement of other movement organizers. In Quebec, independent solidarity groups and independent actions also sprung up around the student strike, with support from the student associations. During its Vote Together campaign, Leadnow intentionally coordinated self-starting local volunteer chapters to set up teams in certain constituencies. The CUPW-CPAA unions activated grassroots digital "ambassadors" from among their membership and encouraged them to become autonomous boosters of the postal banking campaign in their communities.

Elsewhere: This approach has notably been perfected by the anti-street harassment network Hollaback!, which has activated chapters in 26 countries and equips its volunteer local leaders with a common vision and skills through a well-developed webinar training program. Distributed agency was also a strategy successfully implemented by Bernie Sanders' presidential campaign, 350.org and the #Not1More movement against immigrant deportations in the U.S.

Gathering ideas and content from your crowd
Listening actively to your base and inviting their input to inform campaign content and strategy

Campaigns that actively consult their audiences and draw on their collective intelligence have access to new assets and power. What would have been an onerous task in the past is now a distinct strategic possibility in an age where two-way communication at the group level is relatively cheap and easy.

Active audience input and listening can take the form of polling supporters on future priorities, letting supporters suggest and initiate their own online petitions, and allowing supporters to generate their own digital campaign content through images and other forms of testimonials. Campaigners that have adopted one or more of these tactics have benefitted from a more involved supporter base that sees its own story and voice out in front of the movement.

In Canada: ACORN Canada explicitly involves its grassroots members in policy design by canvassing low-income community members, door to door, on their key priorities. OpenMedia, for its part, has refined the art of digital crowdsourcing and has built a process that involved thousands of Canadians in the collaborative planning of a digital rights policy. During the Quebec student strike, key decisions were arrived at through arduous and extensive open consultations with student association members. Black Lives Matter-Toronto, Idle No More and the Canadian Tar Sands Campaign have all sourced creative ideas, artwork and multimedia content from their supporters, who are responsible for the iconography and some of the key communications elements of these campaigns.

Elsewhere: Online activist network Avaaz.org runs, in addition to its long-standing member-initiated petition program, a yearly polling program with its over-40-million-person audience base to determine strategic directions for the coming year. Other groups implementing extensive audience listening and supporter-led petitions include SumOfUs.org, MoveOn.org and Groundswell.

Showing your people power
Mirroring collective voices back to your supporters and to campaign targets

A wide base of grassroots support can be a powerful campaign tool as well as a self-reinforcing motivational asset if support numbers are made publicly visible to campaigners and pressure targets alike. Corporate or government targets are vulnerable to large waves of public dissatisfaction, especially when this happens in view of larger audiences. Alternately, supporters are inspired and reassured when they can see that they are part of a much larger movement.

Showing people power often begins with online petitions that garner numbers into the tens or hundreds of thousands until there is sufficient visible support to anchor further online and offline actions around the campaign issue. Alternately and often in addition, campaign supporters are frequently directed to "swarm" a government or corporate pressure target through online and offline messages and to voice their collective desire for social change.

In Canada: Impossible to ignore at its height, the Quebec student strike drove hundreds of thousands of students and cross-movement supporters onto the streets of the province's major cities and towns for months on end. With smaller numbers, the Black Lives Matter-Toronto Tent City and Idle No More's flash "round dances" in malls across the country captured and sustained public attention with their novelty and daring. Leadnow and OpenMedia have mastered the art of summoning digital crowds through online petitions to show the numbers behind advocacy demands.

Elsewhere: Using people-power as a lever for change, online SumOfUs. org typically gather a critical mass of their nine million members around a case of corporate misbehaviour through online petitions. Once this process is set in motion and sufficient buy-in has happened, they will organize offline actions to support the petition and drive supporters to swarm their corporate targets both online and in real space on occasions such as board meetings. Similar tactics are employed by Avaaz.org, MoveOn.org, #FightFor15 and Greenpeace.

Allowing for customization and adaptation

Giving freedom to supporter groups to adapt campaign identity and messaging to suit their culture

While many nonprofits and NGOs have adopted marketing practices from the corporate world in which unity of message and staying "on brand" are essential, the successful practices of several progressive campaigning groups point in the opposite direction.

Groups that allow their supporters to customize and adapt campaign messages and visuals to better suit local contexts are showing that flexibility pays off with higher engagement rates. They succeed because they are building networks across geographic boundaries that better respect the distinct differences in culture and approach at the local level.

In Canada: Committed to growing in an organic and grassroots fashion, an approach modelled on and validating Indigenous organizing, Idle No More encouraged and supported offshoot groups to adopt their own messaging and local identities. As the Quebec student strike gained ground,

autonomous artist collectives led a creative explosion with the blessing of student leader groups. The resulting body of communications, designed for online sharing and for display on the streets, was as extensive as it was diverse.

Elsewhere: 350.org, an organization that runs several global campaigns on climate change in 188 countries, allows its local chapters to manage their own identities, messaging and content. Freedom to customize and build distinct local identities is also enabled by the #FightFor15 and the global network of Hollaback! chapters

RIGHT: Sept. 12, 2015 — the Leadnow team with David Suzuki, about to hit the streets in London North Centre
photo credit: LeadNowCanada (Flickr)

BOTTOM: Idle No More, Vancouver, BC — December 21, 2012
photo credit: Tamara Herman (Flickr)

PRINCIPLE 2: Cross-movement Network Hubs

To move the needle on an issue in previous decades, common practice was to create a cause-based organization and build membership and resources through which pressure could be channeled. The ability to create social change in this model was closely tied to the process of growing an institution. With new possibilities of rapid collaboration and the benefits of working on an issue in a diverse alliance rather than as a single top-down body, network building has emerged as an attractive and efficient new way to build power. Many of the successful campaigns we studied aligned with larger cause networks and devoted considerable energy towards supporting them.

Various aspects of a network society contribute to lowering the transaction costs of building and maintaining wider alliances. The agility of modern communications, for one, allows for rapid appropriation and repurposing of cause messaging by others. On an individual level, affinity with causes rather than organizations encourages people to rally around issues regardless of previous institutional loyalties. It is therefore less important for a single group to "own" a cause and more important that the cause itself find wider resonance with allied groups.

Campaigns that have succeeded in connecting a wide range of networks and have directed them to collectively exert power have benefitted from the amazing force amplification that results from this approach. Furthermore, from the perspective of corporate or political targets, the pressure coming simultaneously from a diverse patchwork of constituencies, rather than a single interest group can be formidable enough to drive rapid concessions.

#Hashtag, not brand

Framing campaigns in an open way so they can be appropriated by other groups and movements

Drawing on the works of evolutionary biologist Richard Dawkins, several campaign theorists have proposed that the most powerful world-changing ideas in today's connected societies should be created as "memes," meaning free-floating packages of thinking and branding

that "infect" large numbers of people with a new way of thinking about social problems.

Though many groups yearn to launch campaigns that are taken up by others, letting go of brand identity and ownership is still very difficult. When a campaign is clearly branded as an organizational initiative, there is little chance that it will be adopted more widely. When the campaign is designed to be open from the beginning—to function more like a hashtag and a shared rallying point for a wider coalition of independent actors—it enables a shift from cause campaign to wider social movement. The result is often much greater impact and reach.

In Canada: With the overarching goal of slowing climate change by blocking new bitumen transport infrastructure, the Canadian Tar Sands Campaign was conceived as a strategy rather than a single branded campaign. This approach allowed nodes of the network to appropriate the naming and framing of regional campaigns across Canada in a way that best inspired local constituencies to join in and lead. Similarly, Idle No More was conceived as a broad framing of the structural discrimination affecting Indigenous people and as a call to action that respected local differences. Launched in this way, the movement was able to cross Indigenous cultural and tribal boundaries, spreading and taking hold in communities all over the country.

Elsewhere: When the Service Employees International Union (SEIU) decided to defend the interests of low-paid workers in the retail and fastfood sectors, it went well beyond its own unionized membership. SEIU created a wider campaign around decent minimum wages for all workers, the U.S. campaign for a $15 minimum wage, that has since been picked up by other groups fighting economic inequality and racial injustice. Few people today even know that #FightFor15 was first created by the SEIU. A similar open approach to campaign ownership has been led by the Sanctuary Movement fighting deportations and by the diverse network opposing the Keystone XL pipeline.

Convene, connect, serve

Deliberately working to maintain a strong and vibrant multi-group network that advances your campaign

Managing large networks requires focused central management of communications and coordinated actions between the different nodes and network outliers.

Staff must operate like air traffic on trollers, making sure that information is flowing across the network and that moments of shared communication and mobilization go smoothly. They must also map movement assets and identify critical weaknesses or gaps, filling them with shared services, oftentimes digital and public relations (PR), so a larger politically-salient narrative breaks through and that network synergies are properly used.

In Canada: With a network of more than 60 groups of all structures and sizes, the Canadian Tar Sands Campaign faced major challenges fighting the oil industry and federal government. To make the sum of the network greater than its parts, a central coordination team provided strategy and coordination, resources, media and digital communications support to all groups in the network. Shared infrastructure, including online platforms, conference calls and occasional in-person meetings, has ensured that information flows among all groups and that energies are directed towards common goals. In addition, the strategic leadership and resource management at the centre of this network gave the combined efforts a significant boost.

Elsewhere: Using the same approach as the Tar Sands Campaign, 350.org has managed a diverse international network of self-starting and self-organizing local groups that mobilize around various climate-related campaign moments. A similar approach to network coordination is also used to hold together the constellation of local groups that have formed around the #FightFor15 campaign.

Working across movement boundaries

Working intersectionally to include diverse voices and communities in the movement you are building

The art of building and maintaining powerful and resilient campaign networks requires empathy and respect for different points of view, theories of change, as well as messaging and organizing approaches. Finding common areas of interest and creating mutually beneficial exchanges among often vastly different groups or movements is a core competency of many of the most successful campaigns in the study group.

In a world of hyper-professionalized campaigns and slick PR coming at the media and decision makers from all sides, campaigns that find and lift up those who are most directly affected by issues find their message stands out and their movement grows. Beyond individual stories, network builders must actively seek out "unusual suspects," groups that are not natural allies but are deeply impacted by campaign issues. Taking the time to reach beyond traditional circles adds richness to the movement, but requires acute respect of different power and privilege issues that many single-issue professional campaigns continue to struggle with.

In Canada: Black Lives Matter-Toronto, driven by a desire to identify and work with the "plurality of blackness," reaches out to support Black people campaigning in other struggles including feminists, queer activists and those fighting climate change. They have found a natural affinity with the struggles of Indigenous people in Canada who, in turn, lent their support to Black Lives Matter – Toronto's various protests. Leadnow, for its part, regularly reaches out to movements across the country that have fewer resources and supports them with its networks and digital campaigning capacity.

Elsewhere: To re-boot, the climate movement in the U.S. and Canada organizers knew they had to go well beyond core supporter groups in the environmental sector to build greater legitimacy and power. The network

that successfully fought to stop Keystone XL in the U.S. and the tar sands in Canada ended up including groups as diverse as Native Americans (First Nations in Canada) and ranchers, united by common concerns. Large intersectional networks are also being built by the climate movement, through the larger notion of "climate justice" and the #FightFor15, which has found common ground with the Occupy Wall Street and U.S. Black Lives Matter movements.

LEFT: LeadNow Canada — Victoria, BC protest
photo credit: Bill Kennedy (Flickr)
BOTTOM: Idle No More, Vancouver, BC — December 21, 2012
photo credit: Tamara Herman (Flickr)

PRINCIPLE 3: Frame a Compelling Cause

Organizational loyalty is fast eroding and this has deep implications for nonprofit campaigners. In the past, organizations could count on their membership to follow by reflex when they sent out a call to action. Today's overstimulated potential supporters, especially millennials, adopt causes rather than institutions[5] when they decide to invest their time in social change.

The need to constantly recruit a new follower base puts pressure on campaigners to become highly adept at winning hearts and minds in an information environment that is already greatly crowded with cause appeals. To do this effectively, they must rapidly provide their audiences with a "why should I care?" statement. Great storytelling that taps into values and cultural mythology becomes a crucial skill in this context.

Storytelling and issue framing is the way to rapidly convert spectators to supporters. Compelling stories, however, need to answer to several criteria. They must touch deep primal concerns shared by the audience and also be framed in a simple and believable way, with a path to victory and a role for the participant.

Focus on action-worthy problems and solutions
Choose fights that can and need to be won

The challenge with engaging people to help solve many of the world's problems is that such problems are increasingly complex and can feel overwhelming. A great number of the current advocacy initiatives being promoted are driven by funding or research imperatives and ask the public to support an approach that is too arcane to grasp or too single-issue to make a difference, or it asks them to join a fight that seems hopeless from the beginning.

By definition, an "action-worthy"[6] problem is one that connects instantly with the shared concerns of a wide (or niche) audience and motivates them to put energy into finding a solution. When such problems are pitched as causes, however, they must be accompanied with a clear and compelling "Theory of Change,"[7] that is, a solution path bold enough to create big change but achievable in real world conditions with a role that each supporter can play in making it happen. Often, this requires cutting down "wicked problems" into manageable and "win-able" pieces.

In Canada: When choosing postal banking as their focus, the CUPW and CPAA unions not only elected to campaign on an issue that affected the economic concerns of many rural and low-income Canadians, they also picked a policy battle that was considered winnable by analysts. In the fight against climate change, the Tar Sands Campaign strategically focused on blocking local oil transport infrastructure as a mobilization goal that was eminently more achievable for Canadians than a broader goal of reducing emissions at the global level. ACORN Canada, as a matter of policy, sources priority issues from its grassroots base and only campaigns for policy change when it believes it can succeed.

Elsewhere: Not1More Deportation organizers realized that the movement to address immigration reform in the U.S. needed to be reframed around deportations, a much more pressing and solvable pain point and a powerful emotional trigger for its community of supporters.

Employ cultural storytelling
Plug into the deep social currents that will truly motivate your supporter base

Stories that connect with deep emotional currents and cultural archetypes shared by a wide group of supporters ensure a good base of energy to draw upon. Strong emotional triggers can include fear for one's own security and well-being, but they can also extend to one's wider community through feelings of injustice or indignation.[7] Such storytelling goes even further when those directly affected by injustice or environmental crises are delivering their testimonies themselves.

Letting supporters speak up for their own passions and sources of anger and frustration is often the best way to discover which causes are driven by strong emotional currents. At a time when it is easy to listen to audiences for cues and professional public opinion and when message framing research is widely available to most causes, campaigns that draw their direction from this data have more chances of being positioned in ways that will drive an energized movement.

In Canada: By the very nature of the communities they emerged from and of the crises they addressed, Black Lives Matter-Toronto and Idle No More speak to the first order concerns of their base, including their health, safety and overall well-being. ACORN Canada, by canvassing its base door to door and starting discussions, learns about the urgent issues affecting its grassroots members in their own words. OpenMedia and Leadnow both follow the inputs and levels of engagement of their digital communities around the many issues on which they campaign. Often, they determine their priorities through this kind of active online listening.

Elsewhere: To find out which issues and stories are closest to the hearts of their 37 million members, the American Association of Retired People has set up a research department dedicated to polling its audience. In this way, it can be sure that each one of the campaign issues to which it devotes resources will have strong pickup and resonance with its base. Avaaz.org, SumOfUs.org, Greenpeace, Upwell and Groundswell all run their own versions of a research department informed by member-led petitions and online polling.

Create oppositional framing

Clearly define who the heroes and villains are in your campaign

One of the fastest and surest ways to mobilize supporters to join is to frame an issue around the threat of a common enemy. Though most issues are multifaceted and complex, there is often a "villain" to be found, if campaign strategists seek to find one. Many of the successful campaigns we studied took this a step further, designating a specific company or individual a "super-villain" and directing a significant amount of attention towards their unacceptable behaviour.

Super-villains in oppositional framing are typically politicians or corporations that have tangibly contributed to making the problem worse and as a result can justifiably be targeted to change their policies. Often, they walk right into the role of the bad actor and give campaigners plenty of fresh material to highlight. Even though the super-villain may only be part of the problem, forcing them to concede will be perceived as a clear victory by all campaign supporters, bolstering the overall campaign.

As important as the villain is in this framing, heroes complete the picture. Many of today's most successful campaigns employ a storytelling strategy that casts their grassroots supporter base as the heroes in the story and give them an active role in taking the villain to task. The NGO is the mentor in the story, not the hero, and the language of "you" taking action and eventually prevailing replaces "we."[8]

In Canada: For the duration of the Conservative Party reign, Stephen Harper and his government were ready villains that, through their consistently polarizing legislation, gave multi-issue progressive campaigners such as Leadnow their driving force. For the Tar Sands Campaign, it was Harper's too-close connection to Big Oil that supporters unrelentingly highlighted. For the CUPW-CPAA and ACORN Canada's campaigns, big banks and payday lenders are pitted against the interests of low-income Canadians. During the Quebec student strike, the fight ultimately opposed students and the Quebec Liberal Party, which played the role of repressive authority figure and standard-bearer of austerity economics at the same time.

Elsewhere: For years, Greenpeace has framed specific super-villains as the focal points of its major pressure campaigns and has directed campaign energy at these targets, often multinational corporations. Oppositional framing is also employed by groups such as 350.org in its campaigns against Exxon and by #FightFor15 when it focused on the wage policies at Walmart and McDonald's.

Multi-channel masters

Tell your story through multiple media at once, use the synergy between channels

At a time when attention spans are now increasingly short[9] and divided among a vast constellation of online and offline media, often further divided by demographic or age, campaigners must push their most important content to flow simultaneously across many channels in

order to make sure their story reaches multiple audience types and ultimately gets blanket coverage.

The multi-channel approach requires planning and resourcing to make sure that content reaches not only mainstream media outlets, which have lost market share but are still dominant with public-opinion makers, but also online and alternative media, while simultaneously being pushed through "owned channels" to an organization's existing supporter base. At the same time, to be effective in social media, key messages must be tweaked to become something that regular people feel compelled to share online, thus creating new waves in people powered media.

In Canada: The campaign to stop the growth of Canada's tar sands set up high-level mainstream PR, a digital communications strategy targeting alternative media and a network-based content sharing approach that engaged partners including NGOs and First Nations. The Quebec student strike waged a communications battle on many levels, including active media relations, disruptive actions on the streets, sustained peer-to-peer driven digital messaging, and an inside track of negotiations directly with government officials.

Elsewhere: The American Association of Retired People actively maintains several communications departments, including a mainstream editorial department that produces content for the association's magazine, a social media production studio that generates multimedia content for digital channels, and a lobbying department that directs advocacy communications at elected officials at state and federal levels. Both Greenpeace and the #FightFor15 fund PR and editorial efforts with the goal of generating investigative mainstream media articles that support campaign objectives. At the same time, their multi-channel digital presence is formidable and a good amount of resources are channeled towards the creation of high-quality online content.

PRINCIPLE 4: Run with Focus and Discipline

Advocacy campaigns are often trying to exert pressure on targets that are much better resourced, often by a factor of 10 and sometimes 100 to 1. When a government or corporation launches a counter-campaign through PR and mass media channels, activists must marshal their staff, budgets and content wisely. When possible, this calls for leadership by seasoned campaigners with a keen sense of timing, relationships and resource management.

Besides field experience, there are now other ways that campaigning organizations can make informed decisions about which advocacy tactics to deploy and when to deploy them. With the right platforms and listening processes, campaigners can now draw on testing, data modeling and product development approaches, often drawn from the world of for-profit technology firms.

Running much like tech startups, data driven campaigners run small experiments on audience segments to optimize their campaign messaging before launching to a wider audience. They also track performance carefully and learn valuable lessons on timing and campaign growth patterns, constantly improving processes from one deployment to another.

Be agile, test often, fail fast
Build a rapid prototyping approach into campaign design and deployment

As campaigners seek to optimize their approaches and make the most of their typically meager resources, they are turning more and more to the tech world for inspiration where startups have developed interesting methodologies to address these same challenges.

Taking a product development approach to campaign design[10], organizers are led to work on rapid "iterations" of their plans and messaging with daily status check-ins among point people in various departments. Using test audiences and feedback mechanisms to gather input, modern data driven campaigners can "test run" various

versions of framing elements (also known as "A/B testing") with target audiences and adjust for maximum impact when the campaign is fully deployed. When campaign "prototypes" fail to generate engagement, campaigners must also be ready to let go of their often preciously held ideas so they can focus on what is actually working on the ground.

In Canada: Canada's digital-native organizations have come to master the art of rapid prototyping and have even learned to embrace failure as part of the process. Leadnow, for example, has come to evaluate its campaign performance and gauge the point at which a campaign must be halted and shelved. For such campaigns, it holds mock funerals and accepts that it is time to move on to try another angle. OpenMedia, for its part, has learned over time to judge when a campaign is or is not generating enough public support and needs to be dropped as a result. Both groups perform extensive A/B testing to refine their messaging and track digital audience response rates to inform their decisions.

Elsewhere: Behind the online petitions that millions have signed through Avaaz.org and SumOfUs.org are extensive tracking systems that are used to perform A/B testing of campaign messaging on sample audiences. They then bring performance analytics back to campaigners who only dedicate full resources to campaigns that have demonstrated traction in their test runs. Similar systems are also run by Groundswell through its member-initiated online petition platform and Moveon.org, arguably the first group to have developed a "culture of testing."

Focus your energy on key moments, organize vs. mobilize

Recognize your moments of truth, build up your campaign capital in the meantime

A common cause of campaign failure is the exhaustion of resources and social capital by running in a state of constant high urgency, and consequently being unable to focus a campaign's full power on a target when a tangible opportunity for a win finally appears. This scenario

typically occurs when there is no conscious division between an "organizing" phase versus a "mobilizing" one.[11]

When organizing, a campaign is steadily building relationships, resources, trust, and power. It is a time for experimentation with campaign tactics, narrative development, as well as network and base building. In this model, mass mobilization, major advertising buys, and other avenues that "spend" your power are largely withheld until a clear opportunity for a "winnable moment" on the issue arises. Determining the right moment for mobilization centres around the emergence of winnable moments during which stored campaign capital can be spent in an intensive but time-limited push that creates an unstoppable force.

In Canada: When deciding when to deploy all of their resources on a new campaign, both Leadnow and OpenMedia take their cues from their supporters. When their base demonstrates high levels of enthusiasm and engagement around an emerging issue, Leadnow and OpenMedia know that the conditions are right for a concerted mobilization that includes the organization's full set of assets. In the meantime, regular petitions on multiple issues continually build networks and base for both organizations. Prior to the 2012 student strike in Quebec, student associations had been organizing support against government austerity measures for years. When the government announced a new series of tuition hikes, organizers knew that they had reached a tipping point and could then direct their members to embark on a major strike.

Elsewhere: Though movements for a free and open Internet have been fundraising and building networks of support since the late nineties, they only rally the active participation of their allies during moments of truth such as milestone dates for proposed legislation that would lead to a more restricted and commercially dominated Web. In the fall of 2014, as the Federal Communications Commission (FCC) considered regulations that would give more Internet bandwidth to telecommunications giants in the U.S., the battle for "net neutrality" mobilized the support of 40,000 partner websites whose calls to action were heard by two million supporters and forced public officials to back down.

Play the long game and be resourced for the challenge at hand

When fighting for systemic change, make sure you are equipped to keep at it for the years it might take to arrive at a win

Unseen by most observers, many of the most successful major advocacy campaigns we studied spent years building up power, scaling up their networks and honing their story away from the limelight, before breaking into national consciousness and scoring dramatic victories. There are as few "overnight success" stories in the world of campaigning as there are in the arts.

At the same time, many organizations campaigning on multiple fronts and their funders are overly impatient with certain programs when they do not produce intended short-term results. They tend to scrap big campaigns just as they are getting to a point where crucial relationships and scale are kicking in. If the issue being addressed is complex and entrenched, organizers must plan to fight for years rather than months and have the necessary resources and support put aside to allow them to tough out a fight over the long haul.

In Canada: Kicking off their campaign in 2008, as Canada's unconventional oil production was beginning to ramp up considerably, strategists behind the Canadian Tar Sands campaign knew there would be no easy or immediate victories and therefore prepared for a fight that would last for many years. The Quebec student movement had historically leveraged pressure against tuition hikes through cyclical strikes that were called once a decade on average. The 2012 strike was initiated as the result of an organizing struggle that had been ongoing since the student movement's previous mobilization in 2005.

Elsewhere: Although its surprising victories, such as forcing Walmart and McDonald's to raise minimum wages, drew major media attention in 2015, the #FightFor15 campaign had in fact been active in many cities across the U.S. since 2012. It took more than two and a half years of sustained campaigning and considerable organizational financing for this movement to become a force to be reckoned with. The movement is ongoing at the time of writing and continues to be sustained by funders five years after its launch date.

6.0 APPLYING THE MODEL

None of the campaigns we studied integrated every single one of the approaches highlighted above. The directed-network campaigning model is not meant to be strictly prescriptive. However, if you are excited by the potential of applying one or several of these approaches to enhance your organization's force amplification and impact, here are three things you can do to begin to integrate them into your work, starting right now.

Three ways to start directed-network campaigning right now

1. **Start by knowing where you are:** Convene a team of like-minded colleagues who all "get" this new world, are concerned about your current limitations and excited about change. Using this report as a checklist, run your institution or most active campaign through the directed network campaign model, giving yourself a score of 1 to 5 based on how well you embody each of the principles and approaches. Without an accurate map of this new terrain you are fumbling around in the dark, overwhelmed and with nowhere to start. With a passionate change team of internal innovators and an accurate map, you're armed to start your own internal campaign for change.

2. **Shine light on what's working, shore up what's not:** Chances are the places where you will find the most vitality and success in your campaigns already line up with many of the approaches in the directed-network model. Start by identifying and sharing stories about which tactics are showing solid results and put your attention there to reinforce the approaches within your organization. Then, look at where your work is the weakest. Without overly focusing on problems, look deeper at the underlying issues of culture, structure, values and leadership that are keeping you from becoming better at this. Knowing what you're already good at and what will still prove challenging is a solid foundation for a realistic innovation plan.

3. **Boldly apply it to your next campaign:** Whether you run it as a low-profile pilot project or above board with the approval of directors and funders, it's important to begin to quickly bake some of these principles and tactics into your next, or even existing, campaigns. Don't try to do 10 new things at once. Grow muscles that

you already have, and avoid (or address, if possible) the areas you know will be a no-go zone for your institution. Execute well on the innovations you choose, and closely track metrics. Finally, be patient. Transformation doesn't happen overnight. When you're starting to grow your internal movement of converts and gather a basket of stories of impact from new approaches, you're ready to implement these innovations more widely.

Of course, the most effective way to transform how your institution runs change campaigns is to run a high-profile change effort that engages front line staff, middle managers, and senior leadership in a more wide-ranging conversation about what real impact means for your work in the 21st century and how aligned your key staff and functions are with what is showing the most results today (i.e. the approaches identified in this report).

Ultimately, this work is about transformation – rebooting our important social change institutions to be more relevant and effective within our current external environment, which is fundamentally different from the era in which most institutions were founded and are still grounded.

The work of transformation is never easy and the same systems barriers that exist in our external work exist within our institutions, our leadership, and ourselves. The world now desperately needs us to be successful in helping it shift to a more just, sane and sustainable direction. We wish you courage, clarity and luck on your difficult but immensely rewarding path as an effective 21st century change-maker.

LeadNow Canada - Vancouver, BC protest,
photo credit: Zack Embree (Flickr)
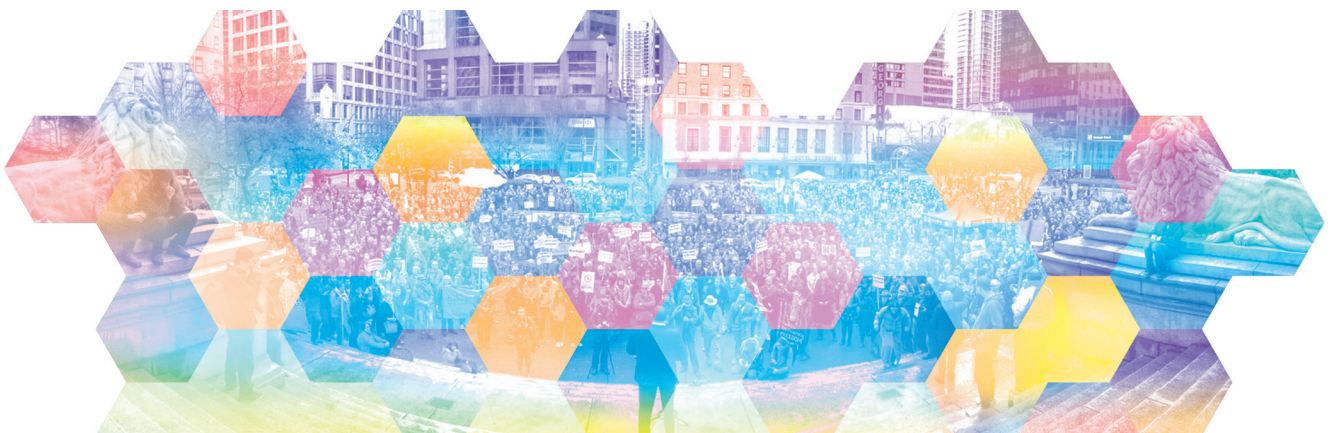
ENDNOTES

1   "Network society" is a concept most notably developed by sociologist Manuel Castells in *The Rise of the Network Society* in 1996. Castells argues that networks are rapidly becoming the dominant model for social organization, going well beyond the digital to influence individual empowerment as well as economic and political power building and interactions. A summary of Castells' thinking is available in his 2000 article, "Materials for an exploratory theory of the network society."

2   On decreasing institutional loyalty among millennials, see the 2013 Millennial Impact Report which observes that millennials "…passionately support causes rather than the institutions working to address them." The report is summarized in a July 2013 Philanthropy News Digest article.

3   On competition in the nonprofit sector, see: "Effects of Nonprofit Competition on Charitable Donations," by Bijetri Bose, Department of Economics, University of Washington, Seattle. The author notably observes that: "Charitable donations, dependent on the economic realities, have not grown at the same pace as the number of charitable organizations during the past decade, making competition for the charitable dollar a pressing issue for the nonprofit sector."

4   On attention spans, research has suggested that the digital media era has begun to alter attention spans and even the structure and functioning of our brains. *The book The Shallows: What the Internet is Doing to Our Brains* is an excellent source on the topic. It expands on the argument made by Nicholas Carr his 2008 Atlantic article, "Is Google making us stupid?"

5   See note: ii above.

6   "Action-worthy problems and solutions" is presented as a concept in a two-part series of articles titled "How we Make Change is Changing" written by Marisa Franco, B Loewe and Tania Unzueta.

7   Manuel Castells explores the theme of passions as primary drivers of new social movements in his 2012 book, *Networks of Outrage and Hope: Social Movements in the Internet Age*.

8   The role of the individual activist as the hero of a grand narrative is covered in Jonah Sachs' *Winning the Story Wars*.

9   On attention spans, research has suggested that the digital media era has begun to alter attention spans and even the structure and functioning of our brains. The book The Shallows: What the Internet is Doing to Our Brains, is an excellent source on this topic. The book expands on the argument made by Nicholas Carr in his 2008 Atlantic article, "Is Google making us stupid?"

10 For a good presentation of the product development approach to non-profit campaigning, see "Product teams: The next wave of digital for NGOs" on Mobilisation Lab.

11 The "organizing vs. mobilizing" concept was coined by Geoffrey MacDougall and is explored more fully in our blog post: Organizing vs Mobilizing – focusing your campaign to win.

ADDITIONAL RESOURCES

The following books and articles were useful to our study and we recommend them to those wanting to dig deeper into new campaigning strategies.

Books

A Lever and a Place to Stand: How Civic Tech Can Change the World, edited by Micah Sifry and Jessica McKenzie. Personal Democracy Media, 2015.

Beautiful Trouble: A Toolbox for Revolution, edited by Andrew Boyd and Dave Oswald Mitchell,

a collaborative effort by over 70 contributors. OR Books, 2012.

Rules for Revolutionaries: How Big Organizing Can Change Everything. by Becky Bond and Zack Exley. Chelsea Green Publishing. 2016.

Digital Rebellion: The Birth of the Cyber Left, by Todd Wolfson. University of Illinois Press, 2014.

Networks of Outrage and Hope: Social Movements in the Internet Age, by Manuel Castells. Polity, 2012.

The MoveOn Effect: The Unexpected Transformation of American Political Advocacy, by David Karpf. Oxford University Press, 2012.

This is an Uprising: How Non-Violent Revolt is Shaping the Twenty-First Century, by Mark Engler. Nation Books, 2016.

Winning the Story Wars, by Jonah Sachs. Harvard Business Review Press, 2012.

Articles

"Understanding 'New Power'," Jeremy Heimans and Henry Timms, Harvard Business Review, Dec. 2014. https://hbr.org/2014/12/understanding-new-power

"How We Make Change is Changing: Open Source Campaigns for the 21st Century," Marisa Franco, Medium.com, June 22, 2015. https://medium.com/organizer-sandbox/how-we-make-change-is-changing-part-i-5326186575e6#.r6cwbimmw

"The Secret of Scale," Peter Murray, Stanford Social Innovation Review, Fall 2013.

https://ssir.org/articles/entry/the_secret_of_scale

"The Mobilisation Cookbook: A Greenpeace Guide to Cooking Up People Powered Campaigns." http://www.mobilisationlab.org/mobilisation-tools/the-mobilisation-cookbook/#.V0WvOJErJN

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